



## **STAFF REPORT**

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### **Final Recommendation of the Outdoor Recreation Task Force**

Honorable Mayor and Council Members

#### **Summary**

The City Council created a citizen task force in July 2002 to make recommendations on funding levels and methods for improvements to community athletic fields, the purchase of open space and the on-going maintenance of the athletic fields and open space areas. The Task Force began meeting in November 2002 and concluded its work in June 2003. The Task Force prioritized athletic fields for improvement, developed a list of acceptable uses for open space and created a set of open space acquisition criteria. Part of the Task Force's charge was to survey the community to gauge support for funding these issues. A professional public opinion survey was conducted in May and the results showed that Belmont voters do not currently support a parcel tax for athletic field improvements and open space preservation. While the Task Force members continue to believe these issues are important community needs that should remain the focus of City attention, they do not recommend the City proceed with a bond measure at this time. The Task Force's work and recommendations can be found in this report and attachments.

#### **Background**

The City of Belmont has a long history of interest in athletic field improvements and open space preservation. In 1997, an advisory ballot measure (Measure E) asking whether voters supported developing a financial plan to purchase the San Juan Canyon for open space and park purposes was approved by Belmont voters with 68% supporting it. It called for the use of either private or public funds. A task force was created to consider options and recommended a special election for a bond to fund open space acquisition. In 1998, the City Council requested the Finance Commission to recommend a \$10 million bond package for financing the acquisition of open space in the San Juan Canyon area. After several meetings, the Commission recommended a 10-year Mello Roos bond. In December 1998, the Council debated a resolution calling for an election on a bond measure. However, the resolution failed to receive the three votes necessary for approval.

In 1992, the City developed a Parks and Open Space Master Plan, and in 2001 Council adopted an Athletic Field Master Plan. The Athletic Field Master Plan identifies design and maintenance improvements for seven fields in the City (four are on school property and three are City-owned). Cost estimates were provided, but no funding source was identified.

Following discussions with the Parks & Recreation Commission in May of last year, the City Council agreed to establish a “Green Task Force” to advise the Council on funding levels and methods for the improvements to community athletic fields, purchase of open space and the on-going maintenance of the athletic fields and open space areas. The idea was to merge two unfunded community desires, improved athletic fields and open space acquisition, and develop a broad-based consensus approach to fund both.

On July 23, 2002 the Council adopted a resolution creating the Task Force and specifying the membership. The Task Force Charge can be found in Attachment A. In October the following members were appointed:

Belmont/Redwood Shores Youth Softball Association – Mike Dutto  
Belmont/Redwood Shores AYSO – Bill Moyle  
Belmont/Redwood Shores Little League – Dave Hendershott  
CYSA (Soccer) – Rick Bowman  
Friends of the San Juan Canyon – Mark Herbach and Mitchell Baker  
San Juan Canyon Preservation Trust – Eric Dentler and George Kranen  
Belmont-Redwood Shores Elementary School District – Eric Shrader  
Finance Commission – Bob Ledoux  
Parks and Recreation Commission – Walt Shjeflo  
Planning Commission – Rick Frautschi  
City Council – Dave Warden  
At-Large members - Joan Dentler and Denny Lawhern

The City hired a consultant (MIG Inc.) to help design a process and develop a work plan for the Task Force. The Task Force began meeting in November 2002 and has held a total of thirteen meetings and two field trips. The Task Force changed its name to Outdoor Recreation Task Force to more accurately and clearly communicate its purpose.

## **Discussion**

### **Organized the Task Force**

At their first two meetings, the Task Force completed the following items of business:

- Selected a Chair- Mike Dutto, and Vice-Chair, Eric Dentler.
- Reviewed and agreed upon the charge, as well as the roles and responsibilities of the Task Force members.
- Adopted meeting guidelines and a meeting schedule.

- Selected “Outdoor Recreation Task Force” as the official name for the task force.
- Refined and adopted a detailed work plan (Attachment B).
- Staff provided background materials including -
  - Park and Open Space Master Plan
  - Athletic Field Master Plan
  - San Juan Hills Area Plan and Western Hills Area Plan
  - Open Space Base Map
  - Geologic Hazards Map
  - Zoning Map

#### Completed an initial survey of the group

Task Force members were asked to complete a survey of key issues to assist the group and staff to determine where there was consensus on the issues and where more discussion was required.

#### Recommended a Method for Surveying Public Opinion

The Task Force discussed various methods for conducting a public opinion survey to determine the level of interest and support in the community for the issues at hand. The Task Force recommended a phone survey be completed for this purpose. Staff then issued an RFP for the services and brought a contract for services with Decision Research, the firm that surveyed for the Belmont-Redwood Shores School District, to Council in April.

#### Athletic Fields

Peter Callander of Callander Associates made a presentation of the 2001 Athletic Field Master Plan. The funding summary of the Plan can be found in Attachment C. The presentation included a review, by site, of the recommended upgrades to all of the school and city athletic fields. The task force discussed and reviewed appropriate maintenance levels for the fields.

The Task Force also discussed including the Belmont Sports Complex and the option of installing artificial turf on the North Field at the Sports Complex.

On January 27<sup>th</sup> the Task Force completed a tour of the various school and City athletic fields including the North Field at the Sports Complex. The tour included a stop at Carlmont High School to view the recently installed artificial turf on the football/soccer field.

Based on information gathered from the tour, Athletic Field Master Plan and input from the youth sports leagues, the **Task Force ranked the fields for improvement**. The results were:

- 1- Nesbit School
- 2- Belmont Sports Complex-artificial turf on the North Field
- 3- Ralston Middle School
- 4- McDougal Park
- 5- Barrett Field at Barrett Community Center
- 6- Fox School

- 7- Central School
- 8- Cipriani School

Options for the level of field maintenance were discussed with the final result being a recommendation to increase the level of maintenance to \$12,000 per acre (from the current \$7,000) on fields that are improved and raising the level to \$9,000 per acre on the fields that are not included for improvement. The \$12,000 figure is based on the current maintenance standard for the Sports Complex.

The Task Force believes the condition of the athletic fields is an important issue that deserves immediate attention. The Task Force supports increased funding for maintenance even if a bond for capital improvements is not achievable at this time. As such, it is recommended that maintenance expenditures be increased to \$12,000 per acre for all fields immediately. The cost of this increase is estimated to be \$100,000 annually.

#### Open Space

Staff presented background information on the private open space areas in the City, showing maps of the areas, zoning and land use maps and geologic hazard maps for the San Juan Canyon. Eric Dentler of the San Juan Canyon Preservation Trust reviewed the history of the City and the Trust's activities in efforts to protect the open space areas in the canyon.

Community Development Director Craig Ewing discussed issues of land use policy related to the open space areas. He reviewed the policies and area plans currently in place that guide decisions on the development and use of open space in Belmont.

On March 1<sup>st</sup> the Task Force completed a walking tour of the open space areas. The tour included stops at Monte Cresta Drive, the San Juan Canyon, Water Dog Lake and the Western Hills above Carlmont High School.

Based on information gathered from the tour and City planning documents, the Task Force completed a discussion and list of uses in open space areas, criteria for acquisition and methods of protecting or acquiring open space. The Task Force has also discussed possibly recommending some policy changes to the City Council, such as rezoning the HRO3 area on the City-owned open space lands in the Carlmont Canyon area.

#### Acceptable Uses for Open Space

- Multi-use Trails \*
- Picnic Areas, including horseshoes
- Playgrounds
- Meadow Areas

- Par Course
- Nature Preserve/ Educational Center
- Dog Park
- Fishing (Water Dog Lake)

\* *The Monte Cresta Area would be for trails only.*

#### Recommended Criteria for Acquisition of Open Space

- Most likely to be developed
- Maximize connections to existing trails
- Connect to existing open space held by the City or others
- Border streams/wetlands
- Preserves plant/natural habitat
- Allows for recreational uses
- Parcels the Trust has options on
- Limit geologic hazards
- Preservation of public views

#### Methods to Protect or Acquire Open Space

The Task Force also discussed a number of ways open space could be protected:

- Purchase
- Easement rights
- Conservation easements
- Development rights
- The Trust as stewards
- Donations
- Negotiations
- Long term leases
- Implementation of current policies and area plans

#### Financing Method

At the March 24 meeting, Tim Schaeffer, a Principal at Fieldman, Rolapp and Associates gave a detailed presentation titled “The Basics of Municipal Debt” and provided handouts to all members. He discussed a variety of financing methods and their advantages and disadvantages. There was considerable dialogue and a number of questions were raised throughout the presentation. At the end, he gave examples of the cost differences between a General Obligation bond, a Certificate of Participation and a Mello-Roos bond. A Mello-Roos bond costs more due to a slightly higher interest rate, but the underlying tax levy provides greater flexibility because the proceeds can be used for capital costs as well as maintenance costs; Mello-Roos also allows for the tax to be based on any rational method of allocation vs. a General Obligation bond which the tax can only be based ad valorem property value.

After discussing the options, the Task Force agreed that a Mello-Roos tax was the best financing

tool because it can be used for both capital and maintenance costs and it is considered more equitable since an equal tax would be placed on each parcel.

### Policy Issues

The Task Force discussed some “policy” issues beyond the specific task of financing athletic fields and open space acquisition. While the City has taken actions to preserve open space and has a number of good policies in place, the Task Force recognizes that these are not set in stone and wants to emphasize the importance of continuing and enhancing such protections. The Task Force discussed other ways to further the goal of maximizing open space areas in the City and wanted to share their thoughts with the Council. Specifically:

- A. Water Dog Lake: The consensus was that Task Force members were comfortable with the provisions of the current lease that provides City use *until the year 2065*. However, the group wanted to encourage the City Council to remain vigilant and look for opportunities that would ultimately lead to full City ownership of the property.
- B. Western Hills (east of Hastings Drive, above Carlmont High School): The current Western Hills Area Plan provides for some limited cluster housing and protection of the remaining land. Should that housing be developed, the Task Force encourages the creation of public access trail easements. The Task Force felt the current Plan limits the development potential for the Western Hills and are satisfied with that. However, as with Water Dog Lake, the Task Force encourages the City to look for opportunities that would further the preservation of the maximum amount of open space in the Western Hills.
- C. Zoning Change for City land in HRO3: The Task Force recommends that the City-owned land in the HRO3 area (between Hastings and Hallmark) be rezoned to Agriculture/Open Space as an additional layer of protection. The Task Force urges the City Council to place this issue on the Priority Calendar list for ranking and action.

### Key Messages Developed

As part of developing the public opinion survey, the Task Force discussed what it felt were the key messages supporting funding for athletic field improvements and open space acquisition. The group’s list can be found in Attachment D.

### Funding Packages Considered

The Finance Director and financial consultant reviewed the Task Force’s desired athletic field improvements, enhanced maintenance costs, and open space acquisition costs to determine the required size of a bond measure. To fund the full package a \$10.3 million bond would be required. This translates into an \$84 parcel tax, including a provision for the increase in required maintenance costs, 30% maintenance contingency and three replacements of the artificial turf at the Sports Complex. Concerned that this might be too high, the Task Force developed three scaled-down options (see Attachment E).

### Survey Results

The charge from the City Council to the Task Force included conducting a survey to gauge

public interest and support on the issue. The City contracted with Decision Research to conduct a public opinion poll. The consultant and staff developed a twenty-minute phone survey with input from a sub-committee of the Task Force. The poll was conducted with 400 likely voters in May. The results were presented by the consultant at the June 9 Task Force meeting. The results can be found in Attachment F. The key conclusion of the consultant was, “now is not the right time to move ahead with this parcel tax measure in its current form.” Specific findings include:

- Belmont voters are generally satisfied with the direction of the City and with the provision of City services, including the condition of athletic fields and availability of open space.
- Voters are almost evenly divided when asked if athletic field improvements or open space is a higher priority.
- 52% of respondents say it is a good idea to increase taxes for the purpose of athletic field improvements and maintenance as well as open space acquisition (when no dollar value is attached to the question).
- There is no dollar value tested (ranging from \$20 - \$126 per year) that reaches the 2/3 threshold for a parcel tax for athletic field improvements and open space acquisition.
- Changes to the measure and an improvement in the economic circumstances would help give an eventual measure its best chances for success.

#### Additional Issues

In light of the survey results, the Task Force recognizes that a bond measure this fall is not viable. However, they remain determined to keep these issues visible in the community and desire to build on the momentum generated by the group. As such, the Task Force urges the Council to take “interim” steps for both athletic field improvements and open space preservation. As noted earlier, the Task Force suggests the level of maintenance for athletic fields be increased. On the open space side, the Task Force urges funding of \$20,000 per year to the San Juan Canyon Preservation Trust so they can continue to promote and facilitate the preservation of open space.

#### Finance Commission Input

The Finance Commission was asked to review the Task Force’s work and make a recommendation on the type, size, rate and method of apportionment and term of a funding mechanism. The Commission discussed this matter at their May and June meetings. They recommended a Mello-Roos bond, of at least \$5 million, utilizing the per dwelling unit/square foot methodology adopted for the Belmont Library and a term of 30 years. The Commission also recommended that Council consider this measure in the context of other items that may be on the same ballot. The Commission did not consider the two funding recommendations in this report, as they were raised after the Commission’s review.

#### Fiscal Impact

If the recommendations below are adopted, the fiscal impact would be approximately \$120,000 annually. Should Council wish to proceed with a bond, a tax team consisting of Bond Counsel, Financial Advisor, Special Tax Consultant and other professionals would need to be retained

(approximately \$75,000 to \$100,000) and the cost of the election would increase marginally. *There is no identified funding source for these costs.* Should Council approve the recommendation, funding would be brought back as part of the mid-year budget update next February.

### **Recommendation**

1. The Task Force recommends that the City NOT proceed with a bond measure in November 2003.
  - a. The Task Force recommends the City fund enhanced maintenance at athletic fields (to \$12,000 per acre).
  - b. The Task Force recommends the City contribute \$20,000 to the San Juan Canyon Preservation Trust annually.
2. The Task Force recommends the City adopt the athletic field priorities, open space uses and acquisition criteria as outlined in this report.
3. The Task Force recommends the City adopt the policy positions regarding Water Dog Lake, the Western Hills and the HRO3 zoning change as outlined in this report.
4. The Task Force recommends the City reconsider the issue of athletic field improvements and open space preservation in 2004 (by adding it to the next Priority Calendar review in March 2004)

### **Alternatives**

1. Direct staff to take the actions necessary to proceed with a November 2003 election.
2. Defer additional funding until additional revenues are available.
3. Provide other direction.
4. Take no action at this time.

### **Attachments**

- A. Task Force Charge
- B. Task Force Work Plan
- C. Master Plan Funding Summary
- D. Key Messages
- E. Funding Packages Considered
- F. Survey Results

Respectfully submitted,

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